



# State Of Montana Office of Public Instruction Biennial Report

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**FOR FY2010**

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**INFORMATION TECHNOLOGY SERVICES DIVISION**

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May 1, 2010

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## EXECUTIVE SUMMARY

In fiscal years 2009 and 2010, the Office of Public Instruction stayed on track with its strategic plan, including the completion of its two most important technology goals, the installation of a statewide student information system (Goal #1) and the installation of an electronic grants management program (Goal #2). Both systems are operational and have been integrated into the OPI's day to day activities.

The agency also made good progress on Goal #3 – Improve Network Efficiencies and Capabilities. By its nature, this goal will be ongoing, but key applications have been migrated out of MS Access and a plan to complete the entire .Net conversion is in place and on track to finish in the fourth quarter of 2011.

Other important accomplishments within this goal were the successful migration to SQL SVR 2005 and the replacement of the SAN.

Goal #4 – New Application development is also a goal that will be ongoing. Important achievements for this goal include hiring a project manager to manage the School Staffing project, installing a bar code system for the warehouse that manages surplus equipment for schools and beginning a pilot project for student transcripts.

The Records Management effort (Goal #5) has included the drafting of a new records management policy, which is in the agency approval process. It is anticipated that the policy will be adopted sometime in the third quarter of 2010.

The primary progress for goal #6 – Project Management Office, was the hiring of two project managers to handle two of the agency's largest technology efforts. The agency has also adopted the IT PMO's forms and process as a framework to manage IT projects.

Finally, the Longitudinal Systems Data Warehouse project (Goal #7) is in progress and on track to meet the deliverables as defined in the grant that funds the effort. The agency engaged ESP Solutions Group to assist in both the creation of an RFP for the data warehouse build and to assist in further formalizing the agency's data governance processes. The ESP Solutions Group is a firm that specializes in technology systems and processes for education and has an extensive track record in projects such the data warehouse the OPI intends to build. The agency is on track to issue the RFP for the data warehouse build and the purchase of business intelligence tools in the fourth quarter of 2010.

# SECTION 1: AGENCY IT PLAN ACCOMPLISHMENTS – GOALS & OBJECTIVES

Complete this section by copy and pasting the Goals and Supporting Objective/Actions listed in section 4.1 of your agency's 2008 plan. After each supporting objective, insert the two additional questions for accomplishments and status. Answer these two questions.

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## 1.1 Goals

### *Goal Number 1:*

#### **ITG 1      Achievement in Montana (AIM)**

**Description:** Student information system used to exchange data between the OPI and school districts as a means for the OPI to provide timely, valid and reliable information to support state policy analysis and decision-making and to meet state and federal reporting mandates.

AIM was implemented in 2006 and has assigned unique student identifiers to all K-12 students who receive any form of education service through a public school district or special education cooperative. This includes part-time and full time regularly enrolled students, home school or private school students, pre-school students, 19, 20 or 21 year old students.

AIM tracks a wide variety of student information including enrollment and demographic information, scores on statewide assessments, information for determining a school's Adequate Yearly Progress Report required by the No Child Left Behind Act, student graduation and dropout information, information needed for serving students with disabilities, and participation of students in federal and state grant programs. Some data is confidential and must be managed in compliance with state and federal laws, for example the Family Educational Rights and Privacy Act (FERPA).

The Special Education Records portion of this system will be fully integrated with AIM and will manage student and staff information, support teachers in completing special education paperwork demands, document decisions made during the Child Study Team meetings, development and maintain individualized education plans, improve compliance with state and federal regulations, and reduce time and effort of teachers when completing required reports for special education.

**Benefits: What benefits are realized and who realizes the benefits?** AIM provides the OPI and school districts with tools for interactive querying and reporting of the data, streamlines the reporting of student-related data from school districts to the OPI, enables data driven decision making, and allows stakeholders at all levels to make informed educational decisions based on accurate and timely information.

**Does this goal support the State IT Strategic Plan? If so, how?** This goal supports the State's goal of developing IT resources in an organized, deliberative, and cost-effective manner and by protecting individual privacy and the privacy of information contained within IT systems.

#### **Supporting Objective/Action**

**ITO 1-1**      Implement Best Practices - The OPI will use project management methodologies, including independent verification and validation, continuous strategic planning and system development life cycle, including testing and quality assurance. Please refer to IT Goal 6 for more specific information on the agency Project Management goal and objectives.

*Accomplishments (describe what the agency has done to achieve this objective, list percentage of accomplishment e.g. 50 %):* The AIM product is now a mature system. Best practices were used to develop the solution and are used to manage the ongoing modifications to the system. The larger goal of establishing project management practices has been moved to Goal 6. This objective is considered 100% complete.

*Status (completed, substantially completed, deferred, delayed, cancelled, or on-going):* COMPLETED.

### **Supporting Objective/Action**

**ITO 1-2** Obtain Funding - Evaluate current funding for the project and develop an implementation strategy to reach adequate funding levels for the project and gain Executive and Legislative approval for funding of project. The OPI will continue to explore grant opportunities and apply for grants as they become available to help offset the costs of this project.

*Accomplishments (describe what the agency has done to achieve this objective, list percentage of accomplishment e.g. 50 %):* Project funding was obtained for project and the state funding is now built into the agency's base budget. The objective is considered 100% complete.

*Status (completed, substantially completed, deferred, delayed, cancelled, or on-going):* COMPLETED.

### **Supporting Objective/Action**

**ITO 1-3** Implement Business Continuity and Disaster Recovery - The OPI will continue to develop and test its disaster recovery and continuity of operations plan. We will also participate in the disaster recovery test with the Department of Administration/ITSD. Results of testing will include lessons learned and indicate areas of weakness to address in next update of plan.

*Accomplishments (describe what the agency has done to achieve this objective, list percentage of accomplishment e.g. 50 %):* The last disaster recovery test was completed successfully in April 2008. Business continuity planning was started in the spring of 2010 as part of the overall business continuity plan for the OPI. This objective has been incorporated into objective ITO 3-4 and is considered 50% complete.

*Status (completed, substantially completed, deferred, delayed, cancelled, or on-going):* COMPLETE.

### **Supporting Objective/Action**

**ITO 1-4** Implement security policies, standards, and identification tools to help minimize security risks. - Develop security policies for dealing with student records and train staff on these policies. Implement ePass.

*Accomplishments (describe what the agency has done to achieve this objective, list percentage of accomplishment e.g. 50 %):* All policies and procedures are in place and the staff has been trained in their use. OPI mandates training on student records confidentiality policies for new staff. In light of the recent purchase of Oracle's Identity Management solution, the ePass portion of this object has been cancelled.

*Status (completed, substantially completed, deferred, delayed, cancelled, or on-going):* COMPLETED.

### **Supporting Objective/Action**

- ITO 1-5** Install and use business intelligence tools that can be used by the OPI staff, school districts, and the public to query data and analyze trends in the K-12 education system. - OPI will evaluate the business intelligence tools that are available in AIM and identify any gaps between that tool and what is needed. If gaps are identified, OPI will pursue options for acquiring more robust business intelligence tools.

**Accomplishments** (*describe what the agency has done to achieve this objective, list percentage of accomplishment e.g. 50%*): This objective has been moved to the Longitudinal Systems Data Warehouse project (goal #7).

**Status** (*completed, substantially completed, deferred, delayed, cancelled, or on-going*):  
**CANCELLED.**

### **Supporting Objective/Action**

- ITO 1-6** Support the OPI information management functions - AIM will assist the agency with managing information related to student demographics and mobility, assessment, and adequate yearly progress.

**Accomplishments** (*describe what the agency has done to achieve this objective, list percentage of accomplishment e.g. 50%*): The project is completed and the data AIM collects and manages is integrated into the operations of the agency.

**Status** (*completed, substantially completed, deferred, delayed, cancelled, or on-going*):  
**COMPLETED.**

## **Goal Number 2:**

### **ITG 2      Design and Implement an Electronic Grants Management (e-Grants) System**

**Description:** The Office of Public Instruction (OPI) currently manages the state and federal grant allocations to 430 operating school districts and 21 special education cooperatives in more than 40 grant categories. While the Office of Public Instruction has developed electronic systems for districts to apply for grants and for the office to allocate funding, the office lacks a comprehensive system for managing the allocation of \$700 million in state and federal monies.

The electronic grants management system will allow the OPI to electronically post grant announcements, review grant applications, process payments, monitor compliance, approve budget or grant modifications, and complete federal reports all in one comprehensive system. The system would also allow OPI to distribute grants directly to the school district investment accounts authorized under 20-9-235, MCA. From the schools' point of view, the electronic grants management system would allow schools to complete applications online, check the status of their application, request payments, respond to compliance issues, and submit close-out reports at the end of the grant period.

**Benefits:** What benefits are realized and who realizes the benefits? The benefits to the OPI and schools are that the system would reduce paperwork, automatically generate reports, improve efficiency, dramatically reduce processing time for payment requests and carryover approval, and create an impeccable audit trail.

**Does this goal support the State IT Strategic Plan? If so, how?** This goal supports the state goal to develop IT resources in an organized, deliberative, and cost-effective manner and the goal to improve government services.

### **Supporting Objective/Action**

**ITO 2-1** Implement Best Practices - The OPI will use project management methodologies, including independent verification and validation, continuous strategic planning and system development life cycle, including testing and quality assurance. Please refer to IT Goal 6 for more specific information on the agency Project Management goal and objectives.

***Accomplishments (describe what the agency has done to achieve this objective, list percentage of accomplishment e.g. 50 %):*** The e-Grants product is now a mature system. Best practices were used to develop the solution and continued to be used to manage the ongoing modifications to the system. The larger goal of establishing project management practices has been moved to Goal 6. This objective is considered 100% complete.

***Status (completed, substantially completed, deferred, delayed, cancelled, or on-going):*** COMPLETED

### **Supporting Objective/Action**

**ITO 2-2** Implement Business Continuity and Disaster Recovery - The OPI will continue to develop and test their disaster recovery and continuity of operations plan. We will also participate in the disaster recovery test with the Department of Administration/ITSD. Results of testing will include lessons learned and indicate areas of weakness to address in next update of plan.

***Accomplishments (describe what the agency has done to achieve this objective, list percentage of accomplishment e.g. 50 %):*** Last disaster recovery test was completed successfully in April 2008. Business continuity planning was started in the spring of 2010 as part of the overall business continuity plan for the OPI. This objective has been incorporated into objective ITO 3-4 and is considered 50% complete.

***Status (completed, substantially completed, deferred, delayed, cancelled, or on-going):*** COMPLETE.

### **Supporting Objective/Action**

**ITO 2-3** Implement security policies, standards, and identification tools to help minimize security risks. - Develop security policies for dealing with financial data and train staff on these policies. Implement ePass.

***Accomplishments (describe what the agency has done to achieve this objective, list percentage of accomplishment e.g. 50 %):*** All policies and procedures are in place on the staff has been trained in their use. In light of the recent purchase of Oracle's Identity Management solution, the ePass portion of this object has been cancelled.

***Status (completed, substantially completed, deferred, delayed, cancelled, or on-going):*** COMPLETED

### **Supporting Objective/Action**

**ITO 2-4** Support OPI's management of state and federal grant program functions - The OPI will electronically post grant announcements, review grant applications, process payments, monitor compliance, approve budget or grant modifications and complete federal reports. School districts will be able to access this application through the web, check the status of their applications, request payments, reply to compliance issues, and submit closeout reports.

*Accomplishments (describe what the agency has done to achieve this objective, list percentage of accomplishment e.g. 50%):* The e-Grants system is fully operational and integrated into the OPI's operations.

*Status (completed, substantially completed, deferred, delayed, cancelled, or on-going):* COMPLETED

### **Goal Number 3:**

#### **ITG 3 Improve Network Efficiencies and Capabilities**

**Description:** Improve network efficiencies and capabilities by utilizing virtual servers and implementing new technologies when older technologies no longer serve their function and the mission of the office.

**Benefits: What benefits are realized and who realizes the benefits?** Reduced cost, improved employee and program efficiencies, as well as customer satisfaction with related information and availability of services.

**Does this goal support the State IT Strategic Plan? If so, how?** This goal supports the state goal of developing IT resources in an organized, deliberative, and cost-effective manner and the state goal to improve government services.

### **Supporting Objective/Action**

**ITO 3-1** Utilize virtual servers and consolidate servers where applicable

*Accomplishments (describe what the agency has done to achieve this objective, list percentage of accomplishment e.g. 50%):* Project is ongoing. The initial experience with virtual servers experienced issues with print servers and was backed out. Virtual servers will be utilized in the identity management solution and in the data warehouse project. The AIM system has been moved to virtual servers and e-Grants is scheduled to move to the virtual environment in September of 2010. 50% complete.

*Status (completed, substantially completed, deferred, delayed, cancelled, or on-going):* ON-GOING

### **Supporting Objective/Action**

**ITO 3-2** Convert existing MS Access applications to .NET - Migrate existing MS Access applications to .NET web/Windows applications as time, resources, and/or needs dictate.

*Accomplishments (describe what the agency has done to achieve this objective, list percentage of accomplishment e.g. 50%):* A plan was developed to migrate existing MS applications to the .NET environment. The project is progressing and scheduled to complete in Q4 2011. 50% complete

*Status (completed, substantially completed, deferred, delayed, cancelled, or on-going):* ON-GOING

### **Supporting Objective/Action**

**ITO 3-3** Upgrade database servers to SQL 2005 - Install SQL Server 2005 on OPI's production, database servers

*Accomplishments (describe what the agency has done to achieve this objective, list percentage of accomplishment e.g. 50%):* **Objective was completed in August 2008.**

*Status (completed, substantially completed, deferred, delayed, cancelled, or on-going):* **COMPLETED**

### **Supporting Objective/Action**

**ITO 3-4** Update disaster recovery plan and create a Continuity of Operations Plan - The OPI currently has a disaster recovery plan for an agency-specific failure, but does not have a complete Continuity of Operations Plan. The OPI will work with the Department of Administration to prepare and test such a plan.

*Accomplishments (describe what the agency has done to achieve this objective, list percentage of accomplishment e.g. 50%):* **The project was assigned to an internal resource, which has started to collect the information required to develop the final plan. 25% complete.**

*Status (completed, substantially completed, deferred, delayed, cancelled, or on-going):* **ON-GOING**

### **Supporting Objective/Action**

**ITO 3-5** Replace existing SAN - Current SAN is 5 years old and needs to be replaced. The 2007 Legislature gave the OPI one-time only funds in order to replace this equipment.

*Accomplishments (describe what the agency has done to achieve this objective, list percentage of accomplishment e.g. 50%):* **Objective was completed in August 2008.**

*Status (completed, substantially completed, deferred, delayed, cancelled, or on-going):* **COMPLETED**

### **Supporting Objective/Action**

**ITO 3-6** Interactive video conferencing at the desktop

*Accomplishments (describe what the agency has done to achieve this objective, list percentage of accomplishment e.g. 50%):* **The OPI purchased the Adobe Connect solution and has been using it for training and other meetings where information has to be provided to a large, geographically separated audience.**

*Status (completed, substantially completed, deferred, delayed, cancelled, or on-going):* **COMPLETE.**

### **Supporting Objective/Action**

**ITO 3-7** More use of video streaming

*Accomplishments (describe what the agency has done to achieve this objective, list percentage of accomplishment e.g. 50%):* **The OPI is a long time user of VisionNet and continues to use it on an ongoing basis. Additionally, the agency purchased Adobe Connect and trained personnel on its use. The objective is considered complete as of March 2009.**

*Status (completed, substantially completed, deferred, delayed, cancelled, or on-going):* **COMPLETED**

#### *Goal Number 4: (taken from 2008 plan and 2009 update)*

##### **ITG 4      New application development**

**Description:** There are several new upcoming projects that will need to have applications developed. Many of these may require purchasing an off the shelf product, some may be developed in-house, and others may require the services of a contractor. Each application will be evaluated to determine the best use of existing tools, staff, and budget.

**Benefits: What benefits are realized and who realizes the benefits?** The OPI is required to comply with many state and federal mandates for reporting data. The applications listed below will streamline the process and make decisions and actions based on these decisions more timely and accurate.

**Does this goal support the State IT Strategic Plan? If so, how?** This goal supports the state goal to develop IT resources in an organized, deliberate, and cost-effective manner.

##### **Supporting Objective/Action**

**ITO 4-1**      Develop a school staffing application - The school staffing application will integrate teacher information from several sources, including salary and benefits; educator qualifications, credentials, and experience; licensure status; and school and district personnel assignments.

*Accomplishments (describe what the agency has done to achieve this objective, list percentage of accomplishment e.g. 50%):* A project manager was assigned to the school staffing effort, and four sub teams were established to work on different facets of the effort. The project plans on publishing an RFP during the fourth quarter of 2010. The project is considered 10% complete.

*Status (completed, substantially completed, deferred, delayed, cancelled, or on-going):* ON-GOING

##### **Supporting Objective/Action**

**ITO 4-2**      Replace the current web report card application with a new tool

*Accomplishments (describe what the agency has done to achieve this objective, list percentage of accomplishment e.g. 50%):* This objective is on hold pending the outcome of the data warehouse project (goal #7). It is anticipated that the data warehouse will purchase tools that can be utilized to develop a new report card.

*Status (completed, substantially completed, deferred, delayed, cancelled, or on-going):* DEFERRED.

##### **Supporting Objective/Action**

**ITO 4-3**      Electronic Student Transcript Exchange

*Accomplishments (describe what the agency has done to achieve this objective, list percentage of accomplishment e.g. 50%):* A pilot project was completed with the University of Montana in 2009. In conjunction with the Office of the Commissioner of Higher Education, the OPI has developed a high-level plan for how the state would collect student transcript information for each K-12 student at the completion of each grade and store that information in an electronic student transcript repository. However, funding has not been identified for this project. 5% complete

*Status (completed, substantially completed, deferred, delayed, cancelled, or on-going):* DEFERRED.

### Supporting Objective/Action

**ITO 4-4** Direct certification data matching - Match students in AIM with children of parents who apply for food stamps to determine eligibility for free/reduced lunch.

*Accomplishments (describe what the agency has done to achieve this objective, list percentage of accomplishment e.g. 50%):* A temporary solution is in place. The permanent solution is dependent on the rewrite of DPHHS's system and is on hold until the new system is in place.

*Status (completed, substantially completed, deferred, delayed, cancelled, or on-going):* DEFERRED.

### Supporting Objective/Action

**ITO 4-5** Purchase and install a bar scanning system to track incoming and outgoing computer equipment - This system would provide an inventory control management program to the School Computer Equipment Program. The program would provide OPI and the School Computer Program with the ability to track incoming donations and outgoing placements of state donated surplus technology equipment that is provided to Montana's K-12 Schools.

*Accomplishments (describe what the agency has done to achieve this objective, list percentage of accomplishment e.g. 50%):* The system was installed in Q2 2010 and is currently in use.

*Status (completed, substantially completed, deferred, delayed, cancelled, or on-going):* COMPLETED

### Supporting Objective/Action

**ITO 4-6** Graphically report education data using GIS maps. Develop a GIS application to report various demographics about school location, student demographics, achievement, and staffing levels as well as school boundary mapping.

*Accomplishments (describe what the agency has done to achieve this objective, list percentage of accomplishment e.g. 50%):* None – 0% complete

*Status (completed, substantially completed, deferred, delayed, cancelled, or on-going):* CANCELLED

## Goal Number 5: (taken from 2008 plan and 2009 update)

### ITG 5 Records Management

**Description:** Work with the Department of Administration, eRIM committee and the Secretary of State Office to implement an enterprise solution for electronic records management.

**Benefits: What benefits are realized and who realizes the benefits?** Records are easier to locate when needed, will save time and effort locating the records. Standards could be defined as to retention, metadata, archiving, classification, etc.

**Does this goal support the State IT Strategic Plan? If so, how?** Supports the goal to improve government services and develop IT resources in an organized, deliberative and cost-effective manner.

### Supporting Objective/Action

**ITO 5-1** Develop an electronic records management application and policy

*Accomplishments (describe what the agency has done to achieve this objective, list percentage of accomplishment e.g. 50%):* A draft Records Management policy that incorporates electronic records management is currently scheduled for review and adoption by the OPI. An automated solution will

be coordinated with the state's initiative and is currently on hold pending the state solution. 25% complete.

*Status (completed, substantially completed, deferred, delayed, cancelled, or on-going):* ON-GOING

### *Goal Number 6: (taken from 2008 plan and 2009 update)*

#### **ITG 6          Project Management Office**

**Description:** Further develop the Project Management Office (PMO) that will provide the structure needed to standardize project management practices, determine methodologies for repeatable processes, mentor other project managers as well as facilitate IT project portfolio management. Ensure IT projects are being driven by business needs and effective contract management.

**Benefits: What benefits are realized and who realizes the benefits?**

- Project Management: Manage Information Technology projects that meet a critical business need and have a significant budget and/or visibility.
- Project support: Provide project management guidance to project managers in the operations and business units.
- Project management process/methodology: Develop and implement a consistent and standardized process.
- Training: Conduct training programs or collect requirements for an outside company.
- Home for project managers: Maintain a centralized office from which project managers are loaned out to work on projects.
- Internal consulting and mentoring: Advise employees about best practices.
- Project management software tools: Select and maintain project management tools for use by employees.

Portfolio management: As future needs necessitate it, establish a staff of program managers who can manage multiple projects that are related, such as infrastructure technologies, desktop applications and so on, and allocate resources accordingly.

**Does this goal support the State IT Strategic Plan? If so, how?** This goal supports the state goal to development IT resources in an organized, deliberative, and cost-effective manner.

#### **Supporting Objective/Action**

**ITO 6-1**          Implement Best Practices - The OPI will use project management methodologies, including independent verification and validation, continuous strategic planning and system development life cycle, including testing and quality assurance.

*Accomplishments (describe what the agency has done to achieve this objective, list percentage of accomplishment e.g. 50%):* The agency has hired two project managers and will follow the guidelines posted by the IT-PMO. IV&V will be implemented as needed for large, complex initiatives. 75% complete.

*Status (completed, substantially completed, deferred, delayed, cancelled, or on-going): ON-GOING*

### **Supporting Objective/Action**

**ITO 6-2** Business Process Management - The OPI will insure IT projects are being driven by business needs by utilize Business Process Reengineering (BPR) and Continuous Improvement Process (CIP).

*Accomplishments (describe what the agency has done to achieve this objective, list percentage of accomplishment e.g. 50 %): The agency created the Data Use and Analysis Strategic Committee to oversee large IT projects. 75% complete.*

*Status (completed, substantially completed, deferred, delayed, cancelled, or on-going): ON-GOING*

### **Supporting Objective/Action**

**ITO 6-3** Effective Contract Management - Effective contract management will ensure the OPI and vendors under contract fully meet our respective obligations as efficiently and effectively as possible.

*Accomplishments (describe what the agency has done to achieve this objective, list percentage of accomplishment e.g. 50 %): The OPI has a contract management process in place through its project leadership teams. 100% Complete.*

*Status (completed, substantially completed, deferred, delayed, cancelled, or on-going): COMPLETE.*

## ***Goal Number 7: (taken from 2008 plan and 2009 update)***

### **ITG 7 Longitudinal Systems Data Warehouse**

**Description:** The establishment of a data warehouse and the accomplishment of the related objectives will lay the foundation for a longitudinal data system with long-lasting benefits for public education in Montana. The creation of an enterprise-wide architecture will provide a blueprint for the data warehouse and for the consolidation, coordination and expanded use of the entire K12 educational data system. It will also chart the way to facilitate interoperability with pre-Kindergarten and post-secondary data systems.

Data will be migrated to the data warehouse from 17 different major databases currently in use; this coordination will allow greater security of all the data. More important, it will allow the data to be combined and queried in ways that are now extremely labor intensive and therefore infrequently used.

Timely and accurate data and the powerful analyses made possible by the business intelligence tools will be invaluable for the State Superintendent and OPI, the Governor and the legislature, the Montana Board of Public Education (K12), boards of trustees, administrators and teachers. It will assist in policy and resource allocation decisions.

In this project, OPI will: (1) create an enterprise-wide data architecture to map the future for Montana's educational data system, (2) create a data governance structure, (3) establish a data warehouse and migrate data from numerous legacy data systems to the data warehouse, and (4) implement business intelligence tools to make the data accessible for many different users.

**Benefits: What benefits are realized and who realizes the benefits?** The data warehouse is the backbone

of a longitudinal data system. Such a system makes it possible to use growth models both for school accountability and for improving instruction of individual students. It will facilitate federal and state reporting, and it will allow more individualized tracking, instruction and intervention with students by teachers and administrators. In the future, this foundation will make possible parental tracking of student progress and greater public transparency of what is happening in schools. The foundation of all these beneficial outcomes for the Montana educational system is a data warehouse that makes possible a longitudinal data system.

**Does this goal support the State IT Strategic Plan? If so, how?** This goal supports the state goal to develop IT resources in an organized, deliberative, and cost-effective manner and the goal to improve government services.

### **Supporting Objective/Action**

**ITO 7-1** Create an enterprise-wide data architecture to map the future for Montana's educational data systems.

*Accomplishments (describe what the agency has done to achieve this objective, list percentage of accomplishment e.g. 50%):* The agency contracted with the ESP Solutions Group to assist with the creation of the data architecture. The project is currently running and the current state architecture has been documented. The future state architecture will be completed by the fourth quarter of 2010. 50% complete.

*Status (completed, substantially completed, deferred, delayed, cancelled, or on-going):* ON-GOING.

### **Supporting Objective/Action**

**ITO 7-2** Create a data governance structure – The OPI will establish an internal body that will oversee changes, quality control and interpretation of the data held in the agency data stores.

*Accomplishments (describe what the agency has done to achieve this objective, list percentage of accomplishment e.g. 50%):* The agency has created a data governance committee and is testing a process to use with data governance. The agency has also contracted with the ESP Solutions Group to review our current process and to enhance it over the next 2 years. 50% complete.

*Status (completed, substantially completed, deferred, delayed, cancelled, or on-going):* ON-GOING.

### **Supporting Objective/Action**

**ITO 7-3** Establish a data warehouse and migrate data from legacy data systems – In order to expose the data for use by the agency and other interested parties, a data warehouse will be created utilizing the rules established in the enterprise architecture and under the oversight of the data governance committee.

*Accomplishments (describe what the agency has done to achieve this objective, list percentage of accomplishment e.g. 50%):* The establishment of the data warehouse and the migration of data are scheduled to begin in Q1 2011. The team is currently gathering requirements and drafting an RFP. 10% complete.

*Status (completed, substantially completed, deferred, delayed, cancelled, or on-going):* ON-GOING

### **Supporting Objective/Action**

**ITO 7-4** Implement business intelligence tools – In order to effectively use the data stored in the warehouse and to assist in the analysis and presentation of the data a robust business

intelligence tool will be implemented.

***Accomplishments (describe what the agency has done to achieve this objective, list percentage of accomplishment e.g. 50 %):*** The purchase and installation of business intelligence tools is scheduled for 2011. The team is currently gathering requirements and drafting an RFP. 10% complete.

***Status (completed, substantially completed, deferred, delayed, cancelled, or on-going):*** ON-GOING.

## SECTION 2: IT INITIATIVES STATUS UPDATE

Complete this section by copy and pasting the IT Initiatives listed in section 7.1 of your agency's 2008 plan. After each initiative, insert the two additional questions for status and funding. Answer these two questions.

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### 2.1 IT Initiatives (*Taken from 2008 plan and 2009 update*)

***Initiative 1 - Title:*** Electronic Student Transcripts between K-12 school systems and Higher Ed

***Description:*** OPI will request funding for implementation of a student transcript exchange system to exchange student records among K-12 school districts and with post-secondary institutions. OPI proposes to partner with K-12 school districts and the Office of the Commissioner of Higher Education to implement a user-friendly, browser-based, secure application to send, receive, manage, track, print, and import electronic transcripts. This proposal will improve the efficiency, reliability, cost effectiveness, and security of academic transcript exchange.

***EPP Number (if applicable):*** 11003

***Status (completed, substantially completed, deferred, delayed, cancelled, or on-going):***  
Deferred.

***Funding (funded, not funded, or partially funded):***

Not funded. The OPI submitted funding requests to the Montana legislature (L.2009) and the U.S. Department of Education (IES grant application – December 2009). Neither of these requests was funded. OPI will continue to pursue funding opportunities as they arise.

## SECTION 3: ADDITIONAL INFORMATION - OPTIONAL

Other types of information that your agency may wish to report as accomplishments or challenges related to achieving the Goals, Objectives, and Initiatives outlined in your 2008 IT plan.